United States Patent and Trademark Office

Pre-Solicitation Conference
I.T. Product Assurance (ITPA)
DOC52PAPT0401006

Agenda

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Goal

- **Improve industry understanding of the USPTO's new acquisition guidelines and our technical requirements which will enhance our ability to obtain quality services**

- **Seek out honest feedback and solutions**

PTAG Highlights

Background

- **PTO Efficiency Act signed March 29, 2000 granted the USPTO the authority to make purchases and enter into contracts w/o regard to Federal Property & Administrative Services Act (FPAS)**

- **PTAG adopted March 10, 2003**

PTAG Highlights (cont.)

- ■ "Full & Open Competition" (as defined in the FAR) – gone

- ■ Replaced with "maximum reasonable competition" & "fairness"

- ■ Competition threshold increased to $5000

- ■ Simplified Acquisition Threshold for Commercial Items increased to $10M (example, FAR Part 12.6 – streamlined solicitation for commercial items)

PTAG Highlights (cont.)

- **Alternative Streamlined Contracting Approach**

- **Unpriced options allowed without further competition**

- **PTAG designed for flexibility and innovation**

ITPA Acquisition Strategy

Two-Step Streamlined Approach

- **Step 1 – Review Capability Statements and downselect to *no more than* 5 most highly qualified vendors**

- **Step 2 – Issue RFP to the vendors selected from Step 1 and award to the offeror providing the best value**

Acquisition Schedule

- **Receive Capability Statements** *1/12/04*
- **Downselect** **1/23/04**
- **Issue RFP** **2/4/04**
- **Receive Written Proposals** **3/4/04**
- **Oral Presentations** **4/2/04**
- **Award Contract** **4/30/04**
- **Current Contract Ends** **6/30/04**

General Overview of Requirement

- **Contract Period – Base Year Plus 4 Option Years**

- **Contract Type – Cost Plus Fixed Fee, Task Order Driven**

- **Estimated Contract Life Cost - $42 - $45 million**

- **Single Award – Teaming Approach**

- **Unrestricted**

Required Content for Capability Statement

- **Not-to-exceed 20 pages, excluding cover page and table of contents**

- **Submitted electronically to** susan.messina@uspto.gov

- **Deadline for Submission:** *January 12, 2004* .

Required Content for Capability Statement (cont.)

- **(1) proposed key personnel and a description of their functional qualifications and prior work experiences,**

- **(2) past performance information that shall include a description of at least 3 previous or current contracts that demonstrate a proven ability to meet the USPTO's requirements and describe their relevance to the USPTO's effort in terms of similarity to scope and size,**

Required Content for Capability Statement (cont.)

- ■ **(3) technical capabilities in relation to the USPTO's requirements,**

- ■ **(4) the proposed place of performance, and**

- ■ **(5) available resources or plan to acquire necessary resources.**

Organizational Conflict of Interest

"The role of the ITPA contractor will be to serve in the capacity of an INDEPENDENT and OBJECTIVE source for expertise in independent testing and assessment of application and infrastructure components, quality assurance, configuration management, requirements engineering/management, and transition management."

ITPA

- **Services**

- **Technical Area**

- **Expectations**

Office of System Product Assurance (OSPA)

- **Mission**
  - "…establishes and administers programs for quality assurance, requirements engineering, and configuration management of application software and information technology infrastructure components; …"

- **…Based upon Industry Review Board and GSA recommendations:**
  - "…Persons independent of the development effort must perform quality assurance reviews of all products and deliverables throughout the system development lifecycle - designs, software, testing plans,…, etc. "

ITPA Services

- **Independent**
  - Early & On-going Engagement with Projects
  - Independent reviews, assessment, validation, verification, & services
  - Objective
  - Early Cost Effective Defect Detection
  - Avoidance of errors in production

- **Enterprise**
  - Support all AIS projects across all Business Areas
  - Support Infrastructure Projects

- **Standards**
  - Based upon IEEE
  - Influenced by ISO and CMM

ITPA Technical Areas

- **Technical Areas**
  - Quality Assurance
  - Requirements Management/Engineering
  - Configuration Management
  - Independent Testing

- **Support**
  - Enterprise Services
  - Independent Reviews

Quality Assurance

- **Enterprise QA Services**
  - QA Planning
  - QA Trends/Metrics/Statistics
  - QA Consulting/Training
  - Research Best Practice & Benchmarking

- **Independent QA Reviews**
  - Project Products/Deliverables
  - Peer Reviews, Audits, & Surveys
  - Root Cause and Defect Analysis
  - Process Reviews

Requirements Management

- **Enterprise RM Services**
  - Requirement Tools
  - Requirements Mapping/Traceability
  - Requirements Trends/Metrics

- **Independent Requirement Reviews**
  - Review of Requirement Specifications
  - Informal Requirement Peer Reviews
  - Formal Requirement Peer Reviews

Independent Testing

- **Enterprise Testing Service**
  - Testing Planning
  - Testing Tools
  - Testing Trends/Metrics

- **Independent Testing Reviews**
  - Formal Qualification Test (FQT)
  - Performance Test (PT)
  - System Compatibility Test (SCT)
  - Security Tests and Evaluation (ST&E)
  - Section 508 Testing / Accessibility Testing

Configuration Management

- **Enterprise CM Services**
  - CM Tool & CM Library
  - CM Trends/Metrics
  - Configuration Control & Identification /Change Control
  - Independent CM Builds
  - Technical Review Board Minutes

- **Independent CM Reviews**
  - Review of CM documentation & Build Lists
  - Physical Configuration Audits

Product Assurance Customer Expectations

- **Expertise/Excellence**
    - Skills Specific to Technical Area
    - Demonstrated Experience
    - Proven Ability

- **Responsive**

- **Flexible**
    - USPTO LCM Revision(s)
    - Process Alignment
    - Methodologies
    - Tools
    - Reuse
    - Location

QUESTIONS AND ANSWERS

Last Word

- Check FedBizOpps, www.eps.gov, for updates and info on postings

- Additional questions should be addressed to the Contracting Officer, susan.messina@uspto.gov

- Read and follow instructions given in FedBizOpps announcement

- We look forward to doing business with you!